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ABSTRACT

A project was undertaken to review and restructure the secretarial and clerical curriculum at Sikeston Area Vocational School in Sikeston, Missouri. Input from advisory committee members, members of the business community, teachers, and published articles were synthesized to identify additional units that needed to be incorporated into the existing secretarial and clerical program. Subsequent to this review, microcomputer programs were developed to cover the following topics: typewriting (medical typewriting), filing, financial records (bank reconciliation), and mailable letters (punctuation). (Appended to this project report is the course outline that was developed during the curriculum review. The course outline comprises objectives, lists of materials needed, instructions, and actual instructional materials for use in implementing 17 units dealing with various secretarial procedures and office machines. Also provided in the course outline are the actual project-developed microcomputer programs mentioned above.) (MN)

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FINAL REPORT

INCORPORATING MICROCOMPUTERS INTO SECRETARIAL AND CLERICAL VOCATIONAL PROGRAMS

(Project No. 84-131/132-600-2(100-063)

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Sikeston Area Vocational School

Sikeston, Missouri

May 7, 1984

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Missouri Department of Education
Research Coordinating Unit
Jefferson City, Missouri 65102

ABSTRACT

During the research period, Sikeston Area Vocational School's secretarial and clerical curriculum was restructured. Objectives and course descriptions were rewritten. Additional programs were developed for use on the three microcomputers which were in the business and office department.

The first objective was to review and restructure the secretarial and clerical curriculum. To accomplish this objective, each unit in the current curriculum was analyzed to determine the need for including the unit in the new course outline. Research was done through advisory committee suggestions, published articles, business input, and personal teacher experience to determine the need for keeping or disposing of a unit and to determine additional units that needed to be added to the curriculum.

From the findings in objective one, specific objectives for each unit of study were developed.

The third objective was to better utilize the microcomputers in the business department. After researching the material, additional programs were developed for the typewriting unit, filing unit, financial records, and mailable letters.

Research is still being done to develop or purchase a payroll program for use with the microcomputer. Payroll programs researched have all been too expensive or too complex for the desired objective.

Statement of the Problem

Microcomputers have entered the business and educational fields. Business educational curriculum needs to be updated to include units of study that can be correlated with training on microcomputers. Instructors don't have the time to teach traditional units of study plus teach units on the microcomputer. Therefore, the traditional units need to be researched in order to update some areas, delete other areas, and incorporate training on the microcomputer into the curriculum. This updating of any vocational class is of great importance. Vocational education is at a crucial time because of additional emphasis being put on academic education. Vocational education must stay abreast of the times and meet the needs of the students and the demands of the job market in order to stay in existence.

Objectives

1. Review and restructure secretarial and clerical curriculum.

   Most units being taught were left in the curriculum, however, many units were updated and shortened. It appears that the business community requires that secretarial and clerical students have all the traditional skills of typing, shorthand, proofreading, grammar, and spelling plus new knowledge of microcomputers, memory typewriters, etc.

2. From the findings in objective one, specific objectives for each units will be developed.

   Unit objectives were rewritten, updated, and brought to focus on current needs.

3. A minimum of three programs will be developed for use on the microcomputer.

   Microcomputer programs were developed for the following areas.

   a. typewriting (medical typewriting unit)
   b. filing
   c. mailable letters (punctuation)
   d. financial records (bank reconciliation)

Population and Sample

It is felt that this section is not applicable to this particular research project.

Conclusions and Recommendations

It is felt that the basic purpose of the research project was accomplished. The surprising factor seemed to be that most of the material and units being taught were relevant and were still needed in the curriculum. The department would like to locate a payroll program for the microcomputer that would be feasible for use with the payroll unit. Additional research is being done in this area. Other business and office programs can use the individual units in this curriculum or they might want to adopt the entire program. The microcomputer programs developed are simple and quick and can be used in other business classes for motivation or as extra credit. The microcomputer programs are written in such a way that students with no background in microcomputers can make use of them.

Disclaimer

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Procedures

The research for this project was performed through informal interviews, advisory committee meetings during the year, reading articles and attending meetings during the year and personal knowledge from various other sources; i.e. experience, business and office cooperative office education program and informal contact with the business community.

References

N/A

Instruments

N/A

Glossary

N/A

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PREFACE

The following course outlines and objectives are written for use in a business and office 2-1/2 hour block program with approximately 18 - 20 students. It can be used as a whole or individual units could be used in existing programs.

Four microcomputer programs have been incorporated with specific units. Special thanks to the research department for approving the original proposal to incorporate microcomputer programs into the curriculum. There are plans to continue adding additional programs to this curriculum on a local basis as they become available.

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PHILOSOPHY
OF THE
BUSINESS EDUCATION DEPARTMENT

The philosophy of the Business and Office Education Department is that it is our responsibility to develop skills and attitudes necessary to enable students to seek higher education and/or become productive participants in our business community. In meeting these goals the department provides opportunities for persons to participate in career exploration, acquire economic competencies, satisfy personal needs, receive occupational training, and share in adult training.

OBJECTIVES

The Business and Office Education Department will:

1. Provide students with a basic background in the areas of economics, transportation, insurance, communications, banking, recordkeeping, consumer math, career exploration, business procedures, and law necessary to become a productive member of society as demonstrated by the students' ability to pass tests in these areas with 60 - 65% or above accuracy.

2. Develop the students' interest in the field of business as demonstrated by their continued enrollment in business classes and increasing enrollment in the business department.

3. Develop in the students the ability to identify the characteristics of a proper attitude toward the work environment and their co-workers as demonstrated by their ability to complete an evaluation with 65% accuracy and, when applicable, on-the-job.

4. Develop good attitudes toward proper dress and good grooming for students interested in pursuing a career in the business field as demonstrated by the students' appearance in class, at student activities, and on-the-job training.

5. Train students to perform in the basic skill areas of typing and shorthand in order that the student may pursue a career in these areas at the vocational high school level, at the college level, or for personal use. Performance in each area shall be completed with a minimum grade of D- for credit purposes. However, a grade of C must be achieved in the areas of Typing I and Shorthand I in order to enter the vocational program.

6. Train students in the advanced skill areas and in other areas pertinent to pursuing a career in the business office field in order that they may gain entry-level positions as demonstrated by the students' ability to obtain employment when graduated or entering the Business and Office Cooperative Education Program.

7. To acquaint the students with various career opportunities that are available in the business field as demonstrated by the students' ability to identify at least five job titles and tell how they would prepare themselves to obtain such a position.

SECRETARIAL PROCEDURES AND CLERICAL PROCEDURES

Course Outlines

Preface

The same course outlines will be used for both Secretarial Procedures and Clerical Procedures with one basic exception. Shorthand II will be offered in Secretarial Procedures and Accounting will be offered in Clerical Procedures. Simulated practice sets will be used in both classes and simulated office settings will also be used in both classes when time and money are available. All students will be expected to complete their work as if they were in an office. Refinement of skills already acquired and expansion of knowledge in office work are the primary goals of these courses--or--"employability".

SHORTHAND II

A. Introduction

The main emphasis during the third and fourth semesters of shorthand is increasing speed of shorthand writing, expanding competency in transcription, and improving skills in letter placement, proofreading, spelling and punctuation. All letters transcribed for credit must be mailable.

B. Objectives

At the conclusion of Shorthand II, the student should:

1. Be able to transcribe mailable letters at a minimum rate of 80 words per minute for three minutes.

2. Be able to apply skills accurately in letter placement, proofreading, spelling, and punctuation as demonstrated by the ability to transcribe mailable letters.

3. Develop and practice the procedure of verifying names, addresses, dates and amounts in transcripts as demonstrated by the ability to type mailable letters.

4. Develop proper and efficient methods of handling materials and care of equipment as demonstrated by the ability to care for these items.

5. Be able to evaluate work in terms of neatness and accuracy as demonstrated by the quality of work turned in to the instructor for grading.

C. Course Outline

1. Emphasis is placed on reviewing theory and brief forms during the first twenty lessons of the second year textbook. Daily quizzes are given on theory.

2. Dictation is given for transcription twice each week. Short letters of two minutes are given the first day and three/five minute letters are dictated the second day.

3. Practice dictation for speed building is given for a fifteen or twenty minute period twice a week.

Shorthand II Continued

The grading scale for the four quarters of Shorthand II are as follows:

First Quarter

60 wpm	D	This scale is for short letters. A minimum of five letters must be turned in. The average of the five highest grades is taken.
70 wpm	C	
80 wpm	B	
90 wpm	A	

In addition to the five short letters, a minimum of two-three minute letters at 60 words per minute must be turned in during first quarter. All the above letters must be mailable to earn credit.

Second Quarter

60 wpm	D	This scale is for short letters. A minimum of five letters must be turned in. The average of the five highest grades is taken.
70 wpm	C	
80 wpm	B	
90 wpm	A	

In addition to the five short letters, a minimum of two-five minute letters at 60 words per minute must be turned in during second quarter. All the above letters must be mailable to earn credit.

Third Quarter

70 wpm	D	This scale is for short letters. A minimum of five letters must be turned in. The average of the five highest grades is taken.
80 wpm	C	
90 wpm	B	
100 wpm	A	

In addition to the five short letters, a minimum of two-three minute letters at 80 words per minute must be turned in during third quarter. All the above letters must be mailable to earn credit.

Fourth Quarter

80 wpm	D	This scale is for short letters. A minimum of five letters must be turned in. The average of the five highest grades is taken.
90 wpm	C	
100 wpm	B	
110 wpm	A	

In addition to the five short letters, a minimum of two-five minute letters at 80 words per minute must be turned in during third quarter. All the above letters must be mailable to earn credit.

CLERICAL PROCEDURES--ACCOUNTING

Course Objectives

Unit I--The Accounting Cycle In Its Simplest Form

A. Service Business

1. Given an objective test, the student will demonstrate the knowledge of accounting terminology with a minimum of 65 percent accuracy.

2. Given a list of assets, liabilities, and capital accounts, the student will demonstrate the ability to set up, in proper form, a beginning balance sheet.

3. Given a prepared beginning balance sheet, the student will correctly record opening entries in a general journal.

4. Using opening entries from a general journal, the student will post this data correctly into the proper general ledger accounts.

5. Given various business transactions to analyze, which affect the balance sheet accounts, the student will designate the debit and credit part of each.

6. Given various business transactions affecting income and expense accounts to analyze, the student will designate the debit and credit part of each.

7. Using business transactions, the student will correctly record and analyze the data in a journal.

8. Using journalized transactions, the student will properly post the data into the correct general ledger accounts.

9. Upon completion of posting to ledger accounts, the student will prove their accuracy by preparing a correct trial balance.

10. Having completed the journalizing and posting of various transactions, the student will prepare a six-column worksheet.

11. After extending balances on a six-column worksheet, the student will prepare an "end of physical period" income statement and balance sheet.

B. Evaluation

The student will demonstrate an understanding of the accounting cycle by completing a project which will include analyzing, journalizing, and posting business transactions. The student will also be required to prepare the financial reports of the business. All work will be completed with a minimum average evaluation of 65 percent or D-.

Unit II--The Accounting Cycle with the Combination Journal and Subsidiary Ledgers

A. Retail Business

1. Using a combination journal, the student will properly journalize the various business transactions of a retail business.

2. Upon completing a combination journal, the student will post the data into the proper general or subsidiary ledger accounts.

3. The student will write checks, fill out deposit slips and maintain a correct checkbook balance.

4. The student will reconcile a checkbook balance with a bank statement manually.

5. The student will reconcile a checkbook balance with a bank statement by operating a microcomputer and using a bank reconciliation program. (Appendix C)

6. The student will prepare an eight-column worksheet by calculating and recording needed adjustments for merchandise inventory, supplies, and prepaid insurance. The student will then make the necessary extensions on the worksheet.

7. Using a completed worksheet, the student will prepare an income statement, a balance sheet, and a capital statement.

B. Evaluation

1. Upon completion of Unit II, the student will demonstrate the knowledge of the basic accounting

cycle by completing an accounting simulation. This simulation utilizes the combination journal, checkbook, general ledger, and subsidiary ledgers. When the simulation is complete, the student will complete a "finding" test with a minimum of 65 percent accuracy.

2. Upon completion of a chapter(s), the student will apply the principles learned by completing a test with a minimum of 65 percent accuracy.

3. Upon completion of each unit, the student will apply the principles of accounting studied by completing a unit objective test with a minimum of 65 percent accuracy.

4. Upon completion of each unit, the student will apply the principles of accounting studied by completing a unit problem test with a minimum of 65 percent accuracy.

5. Upon completion of learning the principles of reconciling a bank statement, the student will submit a print out of the bank reconciliation used on the microcomputer. The reconciliation will be evaluated on the basis of being "in balance". (Appendix C)

TYPING UNIT

I. Introduction

The purpose of this course of study is to further develop speed and accuracy in producing mailable copies of various business communications, reports, and other business papers which would be prepared in business offices. Production typing will be given at various times throughout the year to help students increase their production rate.

II. Objectives

Upon completion of this unit, students will be able to:

1. Demonstrate the ability to type the following business letters in mailable copy: modified block style, modified block style with indented paragraphs, block style, AMS simplified style, form letters, letters on odd-size paper.

2. Demonstrate the ability to type the following business forms in mailable copy: invoices, purchase orders, bills of lading, interoffice memorandums, requisitions, statements of account, telegraphic messages.

3. Demonstrate the ability to type the following business reports in mailable copy: unbound manuscripts, leftbound manuscripts, news releases, reports with tables, rough draft reports, financial reports.

4. Demonstrate the ability to type the following special typing problems in mailable copy: index cards for mailing lists, file labels, itinerary, agenda, minutes of meetings.

5. Demonstrate the ability to produce production work of business letters, reports, forms, and other various business papers by completing production tests with a minimum of 65% accuracy.

6. Demonstrate the ability to type for five minutes with a maximum of five errors at a minimum speed of 42 net words a minute.

7. Demonstrate the ability to use knowledge gained from typing lessons by successfully completing a typing practice set with all work completed in mailable copy.

III. Materials

1. Century 21 Typewriting Textbook, Second Edition
2. Typing paper--(erasable bond furnished by student is recommended but not required)
3. Eraser or other correction materials
4. Forms as needed for specific jobs

IV. Instructions

Specific instructions and procedures for each job will be given by the instructor.

1. Lesson 162C, page 266, problems 1 and 2, two column tables
2. Lesson 163D, page 267, problems 1 and 2, three column tables
3. Lesson 164C, page 268, problem 1, three column tables with column headings
4. Lesson 165D, page 269, problem 1, four column tables
5. Lesson 204D, page 324, problems 1 and 2, horizontal rulings
6. Lesson 205D, page 326, problems 1 and 2, horizontal rulings and leaders
7. Lesson 206C, page 327, problems 1 and 2, boxed tables
8. PRODUCTION TEST--TABLES, Lesson 167, pages 270-271
9. Lesson 168C, page 272, leftbound report
10. Lesson 168D, page 273, table of contents
11. Lesson 169C, pages 274, 276-278, and 280, type an office manual, (approximately four periods)
12. PRODUCTION TEST--LETTERS, Lesson 174, page 281

13. PRODUCTION TEST--REPORTS AND TABLES, Lesson 175, page 283

14. Lesson 181, pages 290-291, problems 1 and 2, letters and tables on executive size stationery

15. Lesson 182, pages 292-293, problems 1 and 2, letters and tables on government size stationery

16. Lesson 183, pages 294-295, problems 1 and 2, letters and tables on half-size stationery

17. PRODUCTION TEST--SPECIAL SIZE STATIONERY, Lesson 185, pages 295-296

18. Lesson 187C, page 299, problem 1, letter with mailing notation and postscript

19. Lesson 188D, page 301, problem 1, letter with mailing notation, attention line, subject line

20. Lesson 188D, page 302, problem 2, letter with subject line, company name in closing, listed enclosures

21. Lesson 189C, pages 302-303, AMS letter

22. Lesson 190 C, pages 304-305, informal government letter

23. PRODUCTION TEST--LETTERS, Lesson 192B, pages 306-307

24. Lesson 194C, page 310, problems 1 and 2, interoffice memorandum--half sheet

25. Lesson 195C, page 311, interoffice memorandum--full sheet

26. Lesson 195D, pages 311-312, problems 1 and 2, message/ reply

27. Lesson 196B--read, page 313; Lesson 196C, problem 1, page 313

28. PRODUCTION TEST--SPECIAL BUSINESS COMMUNICATIONS, Lesson 198B, pages 314-315

29. PRODUCTION TEST--SPECIAL LETTERS AND COMMUNICATIONS, Lesson 199C, page 317

30. PRODUCTION TEST--SPECIAL LETTERS AND COMMUNICATIONS, Lesson 200C, page 318

31. Lesson 212C, page 336, letter with table

32. Lesson 215C, page 340, business cards

33. Lesson 216C, pages 341-342, problems 2 and 3, purchase orders

34. Lesson 217C, page 343, problems 2 and 3, bills of lading

35. Lesson 218C, pages 344-345, problems 2 and 3, invoices

36. PRODUCTION TEST--PURCHASE ORDERS, BILLS OF LADING, INVOICES, Lesson 220B, pages 346-347

37. PRODUCTION TEST--LETTERS, Lesson 222B, pages 350-351

38. PRODUCTION TEST--LETTERS, Lesson 227B, page 360

39. PRODUCTION TEST--LETTERS, Lesson 247B, page 385

(SUPPLEMENTARY PROBLEMS)

40. Itinerary, page 414

41. Agenda, page 415

42. Statement of Account, page 468

43. Power of Attorney, page 472

44. Press Release, page 473

45. Speech, page 475

46. Voucher Checks--Discuss but do not type--page 356

47. Justifying right margins, page R-5, Check-up Activity 3

TIMED WRITINGS

1. 167C, page 271
2. 173B, page 279
3. 176C, page 285
4. 177C, page 286
5. 178C, page 287
6. 179C, page 288
7. 180D, page 289
8. 186D, page 298
9. 189B, page 302
10. 190B, page 304
11. 193B, page 308
12. 199B, page 316
13. 201C, page 320
14. 202C, page 321
15. 209B, page 330
16. 210B, page 332
17. 211B, page 334
18. 215C, page 339
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23. 228C, page 362
24. 229B, page 363
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26. 232C, page 367
27. 239C, page 375
28. 246C, page 383
29. 246D, page 384
30. 248C, page 386
31. 248D, page 387
32. 251C, page 392
33. 256C, page 397
34. 263B, page 405
35 263C, page 406
36. 274B, page 420
37. 276C, page 426
38. 283C, page 437
39. 290B, page 443
40. 296C, page 453
41. 296D, page 454
42. 298C, page 456
43. 298D, page 457

TIMED WRITING GRADING SCALE
NET WORDS

First and Second Quarter

48--50	A
47	A-
46	B+
43--45	B
42	B-
40--41	C+
37--39	C
35--36	C-
33--34	D+
31--32	D
29--30	D-

Third Quarter

53	A
52	A-
50--51	B+
48--49	B
47	B-
45--46	C+
42--44	C
40--41	C-
39	D+
36--38	D
35	D-

Fourth Quarter

57	A
56	A-
55	B+
53--54	B
51--52	B-
49--50	C+
47--48	C
45--46	C-
44	D+
43	D
42	D-

SECRETARIAL PROCEDURES TEXTBOOK

Course Objectives

UNIT I

1. The student will be able to identify and describe the primary requirements and primary tasks of various office positions as demonstrated by the ability to pass a written test with a minimum of 65% accuracy and take part in class discussion.

2. The student will be able to identify the qualities needed for job success as demonstrated by the ability to pass a written test with a minimum of 65% accuracy and take part in class discussion.

3. The student will research by use of the microcomputer a minimum of two business and office career fields. Written reports will be turned in on each career.

UNITS 2 and 3

These units are correlated with shorthand, machine transcription, typing, and machine rotation. See individual units for specific objectives.

UNIT 4

1. The student will demonstrate the ability to compose business letters by composing the following letters and typing them in mailable form: request letter, acknowledgment letter, order letter, reservation letter.

2. The student will demonstrate a basic knowledge of letter writing by completing a written test with a minimum of 65% accuracy.

UNIT 5

This unit is correlated with the typing unit.

1. The student will demonstrate the ability to type the following special reports in mailable copy: unbound manuscript, title page, table of contents, letter of transmittal, income statement, balance sheet, minutes, lease, and will.

2. The student will demonstrate a basic knowledge of how to prepare business reports and legal documents by the ability to pass a written test with a minimum of 65% accuracy.

UNIT 6

This unit will be presented by the instructor from the textbook, Procedures for the Modern Office, Pasewark & Oliverio, Southwestern Publishing Company, 1983. In this textbook the material is presented in Unit 10. The aid of a handout for the students will also be provided.

The student will be able to:

1. Define the term business data processing;
2. Identify the five methods of processing data;
3. List the steps in the data processing cycle;
4. Identify the different types of electronic calculators;
5. Explain how the input, central processing unit, and output are related in a computer data processing system;
6. Describe the central processing unit of a microcomputer;
7. Describe seven features of a well-designed form;
8. Define and identify the use of a purchase requisition, purchase order, purchase invoice, sales invoice, credit memorandum, and statement;

as demonstrated by the ability to pass a written test with a minimum of 65% accuracy.

9. The student will demonstrate the ability to type a purchase requisition, an invoice, and a statement in mailable copy.

UNIT 7

1. The student will demonstrate a knowledge of various postal services and equipment used in processing office mail as demonstrated by the ability to pass a written test with a minimum of 65% accuracy.
2. The student will demonstrate the ability to fold letters properly.

3. The student will demonstrate knowledge of various shipping services as demonstrated by the ability to pass a written test with a minimum of 65% accuracy.

UNIT 8

1. The student will demonstrate the ability to:

   a. Maintain records relating to office callers;

   b. Demonstrate how to greet and introduce callers;

   c. Describe procedures for handling cancellations and delays in scheduled appointments;

   by the ability to pass a written test with a minimum of 65% accuracy.

2. After recording voices on a tape recorder, the students will evaluate each other on the ability to express ideas, tone of voice, pronunciation of words, and the use of colloquial and slang words and phrases.

3. The student will demonstrate the use of communication skills in group situations by participating in the Cooperative Squares Games.

UNIT 9

1. The student will demonstrate a knowledge of correct telephone techniques by completing a written test with a minimum of 65% accuracy.

2. The student will demonstrate knowledge of special telephone equipment and communication services by completing a written test with a minimum of 65% accuracy.

3. The student will recognize the advantages of correct telephone communications in a business situation as demonstrated by the ability to take part in class discussion after viewing "How to Lose Your Best Customer Without Even Trying."

UNIT 10

1. The student will demonstrate the ability to choose the proper reprographics method for reproducing material based on quality or quantity needed by completing a written test with 65% accuracy.

2. The student will demonstrate the ability to type and duplicate a mimeograph stencil and a fluid duplicator master.

3. The student will demonstrate the ability to operate a photo-copy machine.

UNITS 11 and 12

These units are correlated with the Gregg Quick Filing Practice Set.

1. The student will learn the alphabetical filing rules as demonstrated by the ability to apply these rules to alphabetical card filing, alphabetical correspondence filing, and subject correspondence filing by using the Gregg Quick Filing Practice Set.

2. The student will demonstrate the knowledge of filing equipment and supplies, special files, micrographics, and information systems as demonstrated by the ability to pass a written test with 65% accuracy.

3. The student will demonstrate the advantage of using a microcomputer for alphabetic filing by completing one of the jobs from the Gregg Quick Filing Practice Set on the microcomputer. (Appendix D)

UNIT 13

1. The student will be able to:

   a. Identify references and services used in planning a business trip;

   b. Describe a travel file folder and tell how it is used;

as demonstrated by the ability to pass a written test with 65% accuracy.

2. The student will type an itinerary in mailable form.

UNIT 14 (Clerical Procedures covers this unit in Accounting.)

1. The student will write checks, fill out deposit slips, and maintain correct checkbook balance.

2. The student will manually reconcile a checkbook balance with a bank statement balance.

3. The student will reconcile a checkbook balance with a bank statement by using a microcomputer and produce a printout. (Appendix C)

4. The student will fill out a federal income tax return form 1040A.

5. The student will write receipts and keep petty cash transactions for a specific time period.

6. The student will recognize the importance of budgets to personal and business situations as demonstrated by participation in class discussion.

7. The student will demonstrate knowledge of the use of checking accounts, various forms used in making payments, income tax recordkeeping, and other financial reports, by passing a written test with a minimum of 65% accuracy.

UNIT 15

Upon completion of this unit the student will:

1. Demonstrate the ability to write a letter of application. This will be evaluated by writing a letter of application in response to an ad found in the newspaper.

2. Prepare a personal data sheet to be evaluated on the basis of mailability.

3. Prepare an application form in mailable form.

4. Demonstrate knowledge of correct procedures followed in a job interview by completing a written test with a minimum grade of 65%

5. Demonstrate proper conduct and grooming during a simulated job interview.

SECRETARIAL PROCEDURES TEXTBOOK

Course Outline

I. THE SECRETARY

A. You and a Secretarial Position

1. The Changing Secretarial Image
2. The Secretary Among Office Workers
   a. beginning office workers
   b. the secretary
   c. promotions
3. Basic Skills of the Secretary
   a. taking dictation and transcribing
   b. typewriting
   c. handling communications
   d. operating calculating machines
   e. copying and duplicating
   f. maintaining records
   g. handling travel arrangements
4. Preparation
5. Rewards
   a. varied opportunities
   b. interesting work
   c. economic returns
   d. working conditions

B. Qualities for Job Success

1. Personal Qualities
   a. personal care
   b. appropriate appearance
   c. health
   d. posture and poise
   e. voice and language usage
2. General Work Qualities
   a. cooperation
   b. involvement
   c. orderliness and neatness
   d. trustworthiness
   e. initiative
   f. loyalty
3. The Environment in Which You Work

C. General Responsibilities

1. Organizing and Maintaining the Work Station
   a. the work station
   b. equipment
   c. supplies
   d. decorations
   e. general maintenance and cleaning

2. Establishing Priorities
   a. planning the day's work
   b. organizing a calendar
   c. reviewing your pattern of work
3. Being Alert to Company Developments
4. Increasing Productivity

II. THE SECRETARY AND WORK PROCESSING

A. Recording Dictation

1. Basic Stenographic Skills
   a. writing at varying rates
   b. maintaining alertness
   c. writing unfamiliar words
2. Learning the Work of the Executive
3. Taking Dictation
   a. dictation readiness
   b. dictation tools
   c. dictation procedures
4. Kinds of Dictation

B. Transcribing Dictation

1. Organizing for Transcribing
2. The Transcribing Process
   a. typing letters and reports
      1. handling carbon copies
      2. making corrections
      3. preparing blind carbon copies
   b. proofreading
      1. regular correspondence with familiar content
      2. unfamiliar content
      3. technical material and numbers
   c. completing the transcribing process
   d. improving your transcribing skill

C. Word Processing Equipment

1. Types of Equipment
   a. portable units
   b. standard units
   c. remote control systems
2. The Secretary's Responsibility
   a. dictating skill needed
   b. dictating suggestions
   c. transcribing
3. Other Word Processing Equipment
   a. power typing equipment
      1. magnetic-media machines
      2. paper-tape-media machines

III. PREPARING MAILABLE LETTERS

A. Letter Placement and Styles

1. The First Impression
2. Letter Styles
   a. modified block style
   b. block style
   c. simplified style
3. Letter Punctuation
4. Margins and Spacing
5. Simplifying the Typewriting of Letters
6. Interoffice Memorandums

B. Parts of the Letter

1. Parts of the Letter
   a. letterhead
   b. date
   c. mailing notation
   d. inside address
      1. name and company lines
      2. official titles
      3. street address line
      4. city, state, and zip code line
   e. attention line
   f. salutation
   g. subject line
   h. body
   i. the second page
   j. complimentary close
   k. signature, typed name, and title
   l. reference initials
   m. enclosure notations
   n. separate cover notations
   o. carbon copy notations
   p. postcript
2. Addressing the Envelope

C. Office Stationery

1. Using Office Stationery
   a. type of paper commonly used
   b. size of paper
   c. the letterhead
   d. paper for carbon copies
2. Envelopes
   a. standard envelopes
   b. window envelopes
   c. business reply envelopes and cards
   d. interoffice envelopes

IV. LETTER WRITING

A. Basic Understandings

1. Knowledge of English Grammar
2. Vocabulary of Business Correspondence
3. Planning Your Message
   a. Is your understanding of the letter correct?
   b. Is your information accurate and current?
   c. Is your language appropriate and clear?
   d. Is your message courteous?
   e. Is your message complete?
4. The Structure of the Message
   a. Is your opening appropriate?
   b. Is your message divided by paragraphs?
   c. Is your message presented logically?
5. Organizing Your Writing Tasks

B. Letter Composition

1. Letters of Acknowledgment
2. Letters of Appointment
3. Letters Making Reservations
4. Letters Regarding Meetings
5. Letters of Transmittal
6. Follow-up Letters
7. Thank You Letters
8. Remittance Letters
9. Letters of Inquiry
10. Letters Ordering Goods or Services
11. Form Letters
    a. prospective customer
    b. requesting reference

V. TYPEWRITING REPORTS

A. Preparing Business Reports

1. Importance of Reports
2. Steps in Report Writing
   a. the outline
   b. the rough draft
   c. proofreaders' marks
   d. typing the report

B. Parts of the Business Report

1. Parts of a Report
   a. the cover
   b. the title page
   c. numbering pages
   d. headings
      1. main headings
      2. subheadings

a. side headings
b. paragraph headings
e. preface or letter of transmittal
f. table of contents
g. list of tables
h. summary
i. body of report
j. quoted material
k. footnotes
l. conclusions and recommendations
m. appendix
n. bibliography
2. Gathering Information
3. Proofreading

C. Financial Statements and Reports

1. Understanding Financial Statements
a. balance sheet
b. income statement
2. Producing Typewritten Financial Statements
a. study previous reports
b. check accuracy of calculations
c. type the financial statements
d. proofread the final product
e. file carbon copy of final draft
3. Annual Reports of Corporations

D. Legal Papers, Minutes, and Resolutions

1. Legal Papers
a. typewritten legal papers
1. spacing
2. erasures
3. numbers, dates, and titles
b. printed legal forms
c. notorized legal papers
d. typical legal documents
1. simple contract
2. will
3. deed
4. lease
5. affidavit
6. power of attorney
2. Minutes
a. gathering information for minutes
b. typing the minutes
c. correcting the minutes
3. Resolutions

VI. THE SECRETARY AND DATA PROCESSING

A. Processing Data

1. The Secretary Processes Data
2. What is Business Data Processing?
3. The Need for Processed Data
4. Methods of Processing Data
   a. processing data manually
   b. processing data mechanically
   c. processing data electronically
   d. processing data by unit record
   e. processing data by an electronic computer system
      1. speed
      2. accuracy
      3. storage
5. The Data Processing Cycle
   a. step 1 - origin of data
   b. step 2 - input of data
   c. step 3 - processing of data
   d. step 4 - output of data
6. Flow Chart Symbols

B. Computing Machines and Computers

1. Calculating Machines (Appendix E)
   a. printing calculator
   b. display calculator
   c. combination printing-display calculator
   d. programmable calculator
2. Bookkeeping Machines
3. Accounting Machines
4. Unit Reocrd System
   a. card punch machine
   b. verifier
   c. sorter
   d. tabulator
   e. collator
5. Computers
   a. input unit
   b. central processing unit
   c. output unit

C. Using Business Forms

1. Purpose of Business Forms
2. Form Design
3. Form for Selling
   a. sales invoice
   b. credit memorandum
4. Credit Approval
5. Billing
   a. preparing the invoice
   b. calculating and checking invoices
   c. statements
   d. forms for purchasing
   e. purchase requisition
   f. purchase order
   g. purchase invoice

VII. USING MAIL AND SHIPPING SERVICES

A. Handling Incoming Mail

1. Opening the Mail
   a. dating the mail
   b. underlining and annotating
   c. attaching related materials
   d. organizing correspondence
2. Photocopying Mail
3. Referring and Routing Mail
4. Special Memorandums

B. Handling Outgoing Mail

1. Handling Outgoing Mail
   a. folding and inserting letters
   b. sealing envelopes
   c. stamps
   d. precanceled stamps and envelopes
   e. stamped envelopes and cards
   f. metered mail
   g. zip codes
2. Optical Character Reader (OCR)
3. Items to Check Before Mailing Letters
4. Domestic Mail Service
5. Classes of Domestic Mail
   a. first-class mail
   b. second-class mail
   c. third-class mail
   d. fourth-class mail (parcel post)
   e. mixed classes of mail
   f. mailing suggestions for fast delivery
6. International Mail
7. Special Postal Services
   a. special delivery
   b. special handling
   c. registered mail
   d. certified mail
   e. insured mail
   f. cod service
   g. tracing mail
   h. recalling mail
8. Aids for Volume Mailing
   a. mailing lists
   b. mailing lists on file cards
   c. up-to-date mailing lists
   d. chain feeding of envelopes for a mailing list
   e. addressing machines and addressing services
      1. metal plates
      2. stencil plates
      3. computer addressing

C. Air and Surface Shipping

1. Recent Developments in Shipping
2. Methods of Shipping
   a. shipping guides
   b. parcel post
   c. air parcel post
   d. express mail
   e. air express
   f. bus express
   g. united parcel service
   h. truck transportation
   i. railway freight service
3. Packaging
4. Marketing Goods for Shipment
5. Tracing
6. Claim for Loss

VIII. MEETING THE PUBLIC

A. The Care of Callers

1. The Responsibilities of the Secretary
   a. scheduling appointments
   b. maintaining a calendar
   c. reminding the employer
   d. arranging for facilities
   e. assisting callers
   f. maintaining a record of callers
   g. handling difficult callers
   h. handling delays
   i. maintaining the schedule
   j. leaving the desk

B. Oral Communications

1. Non-Verbal Influences
   a. your appearance
   b. your manners
   c. posture and movements
2. Your Speech Habits
   a. expressing ideas
   b. voice
   c. pronouncing words
   d. colloquial words and expressions
   e. slang
3. Discussions and Presentations
   a. group participation
   b. presentations

IX. RAPID COMMUNICATIONS SERVICES

A. Receiving Calls

1. Telephone Manner

a. voice
b. speech
c. vocabulary
d. courtesy

2. Incoming Calls
   a. answer promptly
   b. identify yourself
   c. screening calls
   d. handling calls when the executive is unavailable
   e. giving information
   f. talking with the anonymous caller
   g. taking messages
   h. transferring calls
   i. automatic answering and recording set
   j. telephone answering service
3. Terminating Calls
4. Personal Telephone Calls

B. Placing Calls

1. Telephone Directories
   a. personal telephone directory
   b. the alphabetical directory
   c. the yellow pages
2. Placing Long-Distance Calls
   a. station-to-station
   b. person-to-person calls
   c. direct distance dialing (DDD)
      1. station-to-station DDD
      2. person-to-person with DDD
      3. person-to-person without DDD
   d. overseas telephone calls
   e. time factor
3. The Cost of Telephone Service
   a. cost for local calls
   b. costs for long-distance calls

C. Special Telephone Equipment

1. Switchboards
   a. cord switchboard
   b. cordless switchboard
   c. call director
2. Touch-Tone Telephone
3. Key Telephone
   a. arrangement of the keys
   b. operating a key telephone
4. Speakerphone
5. Automatic Dialing Telephones
   a. card dialer
   b. touch-a-matic
6. Bellboy
7. Mobile Telephone

D. Special Communications Services

1. Special Long-Distance Calls
   a. collect calls
   b. credit card calls
   c. conference calls
   d. wide area telephone service (WATS)
2. Teletypewriter Service
   a. teletypewriter exchange service (TWX)
   b. teletypewriter private line service (TWPL)
   c. data-phone service
3. Domestic Telegraph Services
   a. the telegram
   b. selecting the service
      1. full-rater telegram
      2. overnight telegram
   c. preparing a telegram
   d. filing a telegram
   e. paying for service
   f. sending money
   g. delivering telegrams
   h. using special telegram services
   i. differences in time zones
   j. the mailgram
4. International Telegraph Service
   a. kinds of service
      1. full-rate messages (FR).
      2. cable letters (LT).
      3. ship radiograms.
   b. code messages
   c. cable code addresses
   d. differences in time

X. THE SECRETARY AND REPROGRAPHICS

A. Copying and Reproducing

1. Copiers
   a. features of copiers
   b. types of copiers
      1. electrostatic
      2. infrared
   c. answering correspondence
   d. collators

B. Duplicating

1. Offset Duplicating
   a. features of offset duplication
   b. principles of offset duplication
   c. types of offset duplicators
      1. table model
      2. floor model
      3. continuous copy model
   d. preparing offset masters
2. Stencil Duplicating

a. features of stencil duplication
b. principles of stencil duplication
c. preparing a stencil
d. duplicating

3. Fluid Duplicating
   a. features of fluid duplication
   b. principles of fluid duplication
   c. preparing a master
4. Electronic Stencil a Reprographics Process

XI. FILING RECORDS

A. Records Control

1. Records Control
2. Secretarial Files
3. Central Files
4. Filing
5. Filing Systems
   a. alphabetic name files
   b. alphabetic subject files
   c. geographic files
   d. numeric files
   e. chronological files
6. The Care of Records
7. Secretarial Responsibilities

B. Filing Rules for Personal Names

1. Filing Rules
2. Alphabetic Indexing for Individuals
   a. order of indexing units
   b. last names (surnames)
   c. last names containing particles or articles
   d. compound last names
   e. first names (given names)
   f. initials and abbreviated first or middle names
   g. unusual names
   h. identical personal names
   i. seniority in identical names
   j. titles and degrees
   d. names of married women

C. Filing Rules for Names of Organizations

1. Alphabetic Indexing for Business Firms and Other Organizations
   a. business or firm names
   b. alphabetic order
   c. articles, prepositions, and conjuctions
   d. abbreviations
   e. single letters
   f. hyphenated names and words
   g. two words considered as one

h. titles in business names
i. compound geographic names
j. numbers
k. foreign names
l. identical business names
m. possessives
n. churches, synagogues, and other organizations
o. schools
p. newspapers and magazines
q. federal government offices
r. other political subdivisions
s. subjects

2. Cross-Referencing
   a. cross-reference for a company known by more than one name
   b. cross-reference for the name of a married woman.

D. Filing Equipment and Supplies

1. Filing Equipment
   a. vertical files
   b. lateral and shelf files
2. Filing Supplies
   a. guides
      1. kinds of guides
      2. number of guides
   b. folders
      1. folder cuts
      2. miscellaneous folders
      3. individual folders
      4. special folders
      5. capacity of folders
3. Labels
   a. folder labels
   b. drawer labels
4. Positions of Guides and Folders
5. Filing Accessories

XII. THE SECRETARY AND RECORDS MANAGEMENT

A. Filing Procedures

1. Collecting Papers for the Files
2. Inspecting
3. Indexing
4. Coding
5. Cross-Referencing
6. Sorting
7. Placing Records in the File
8. Arranging Materials in Folders
9. Filing Efficiency

B. Managing the Records System

1. Charge-Out
   a. charge-out forms
      1. out guides
      2. out folders
      3. carrier folder
      4. substitution cards
   b. photocopies
   c. length of charge time
2. Follow-up
   a. card tickler files
   b. dated follow-up folders
3. Transfer
   a. transferring file folders
   b. the records center
4. Retention

C. Subject, Numeric, and Geographic Filing

1. Subject Filing
   a. guides and folders used in subject filing
   b. subject filing procedures
      1. inspecting
      2. indexing
      3. coding
      4. cross-referencing
      5. sorting
      6. placing material in folders
2. Combination Subject and Name Files
3. Numeric Filing
4. Numeric Arrangements
   a. consecutive number filing
      1. legal files
      2. project and job files
      3. numeric correspondence files
   b. terminal-digit filing
   c. alpha-numeric filing
   d. guides and folders used in numeric filing
5. Geographic Filing
   a. arrangement of a geographic file
   b. cross-reference for geographic filing
   c. card index
   d. geographic filing procedures
   e. summary of filing methods
6. "Office-Made" Filing System

D. Special Files, Micrographic, and Information Systems

1. Card Files
   a. vertical card files
   b. visible card files
      1. signals on visible records
      2. reference visible systems
   c. rotary files
   d. random files
   e. elevator files

2. Micrographics
   a. microfilm
      1. the process
      2. advantages
   b. microfiche
   c. aperture card
   d. computer output microfilm
3. Electronic Data Processing
   a. tabulating (punched) cards
   b. computer tapes and disks
   c. retrieval
   d. which filing systems?

XIII. THE SECRETARY AND TRAVEL RESPONSIBILITIES

A. Travel Services

1. Planning Trips
   a. travel departments
   b. travel agencies
   c. the secretary
2. Domestic Air Travel
   a. classes of services
   b. flight information
   c. airline reservations
   d. pickup of tickets
   e. transportation to the airport
      1. airport limousines
      2. helicopter service
      3. airport parking
   f. cancellation of reservations
   g. air shuttle flights
3. Train Travel
   a. classes of service
      1. coach accommodations
      2. first-class accommodations
   b. railroad timetables
4. Bus Travel
5. Automobile Travel
   a. rental services
   b. automobile clubs
   c. automobile routing
6. International Travel
   a. passports
   b. visas
   c. inoculations
7. Hotel Arrangements
   a. selecting a hotel or motel
   b. making reservations

B. The Itinerary and the Expense Report

1. The Travel Folder
2. The Itinerary

a. preparation of an itinerary
1. travel arrangements
2. hotel/motel arrangements
3. final preparation
b. distribution of the itinerary

3. Travel Funds
a. credit cards
b. traveler's checks
c. letters of credit
d. personal checks
e. cash for international travel

4. Expense Reports
5. Final Preparation for a Trip
6. Maintaining the Office While the Executive is Away

XIV. THE SECRETARY AND FINANCIAL RECORDS

A. Bank Records

1. Accounts
a. opening a bank account
b. making deposits
2. Writing Checks
a. maintaining a record
b. indorsing checks
3. Stopping Payment on Checks
4. Overdraft
5. Reconciliation of the Bank Statement

B. Making Payments

1. Paying Monthly Bills
2. Forms for Payments
a. ordinary checks
b. voucher checks
c. certified checks
d. bank draft
e. cashier's check
f. postal and american express money orders

C. Income Tax Recordkeeping

1. Records Needed for Taxes
2. Tax Information Helpful to the Secretary
3. Sources for Information

D. Other Financial Records

1. Budgets
a. preparing a preliminary budget
b. maintaining a budget
2. Payrolls
a. original records
b. work records

3. Petty Cash Fund
   a. establishing the fund
   b. replenishing the fund
4. Continuing Need for Records

XV. YOU AND SECRETARIAL WORK

A. Opportunities

1. The Job Market
2. Organizational Types
3. Size of Organization
4. Location
5. Becoming Acquainted with Job Opportunities
   a. placement office in your school
   b. employment agencies
   c. classified advertisements
   d. direct inquiry to organization
   e. civil service announcements

B. Employment Application Papers

1. The Personal Data Sheet
   a. its purpose
   b. its content
      1. personal information
      2. education
      3. extracurricular activities
      4. experience
      5. references
   c. its appearance
2. Letter of Application
3. The Application Blank
   a. purpose
   b. cautions in filling the application blank
4. Testing
5. Physical Examination

C. The Personal Interview

1. The Purpose of an Interview
2. Topics Discussed in an Interview
3. The Interviewer's Evaluation
   a. appearance
   b. voice and language usage
   c. temperament
   d. knowledge and skills
   e. mental attitude
   f. objectivity
   g. self-confidence
   h. effectiveness with people
   i. job interest
   j. adaptability
4. The Conclusion of the Interview

5. The Follow-Up

D. Secretarial Positions in Specialized Fields

1. The Legal Secretary
   a. job opportunities
   b. specific duties
2. The Medical Secretary
   a. job opportunities
   b. specific duties
3. The Technical Secretary
   a. job opportunities
   b. specific duties
4. The Educational Secretary
   a. job opportunities
   b. specific duties
5. Opportunities for Federal Employment
   a. civil service tests
   b. qualification requirements
   c. general requirements
      1. age
      2. citizenship
      3. physical condition
   d. selection
   e. overseas opportunities
6. Opportunities for State and Municipal Employment
   a. state civil service
   b. municipal civil service

E. Promotional Projects

1. The Secretarial Ladder
2. Preparation for Higher Level Responsibility
3. Secretarial Associations
4. Beyond a Secretarial Assignment
5. Administrative Management
   a. maintaining sufficient office services
   b. maintaining communication facilities
   c. assessing facilities and equipment
   d. organizing the flow of paper work
   e. supervising and evaluating office personnel
   f. managing the office
6. Your Future

10-KEY CALCULATOR

Course Outline and Objectives

Resources: Electronic and Mechanical Printing Calculator Course; William R. Pasewark; Southwestern Publishing Company, 1974.

Standardized tests correlated with the textbook are also used.

OBJECTIVES

Upon completion of this unit, the student will:

1. Demonstrate the ability to use the touch operation of a ten-key electronic calculator by passing:

   a. A two-digit column test with 65 percent accuracy.
   b. A multi-digit column test with 65 percent accuracy.

2. Demonstrate the ability to use the special register keys of subtraction, multiplication, division, and the decimal key by scoring 65 percent or above on standardized tests.

3. Demonstrate the ability to operate the calculator to prepare, audit, or complete special business reports and problems on standardized tests with 65 percent accuracy or above.

4. Demonstrate the ability to maintain speed developed using the touch system by completing timed intermediate skill drills.

GENERAL INSTRUCTIONS

Read instructions as given throughout lesson and perform the following exercises. Record answers on a plain sheet of paper and submit them to instructor upon completion of assignment. Follow this procedure for all daily jobs.

Lesson 1:

Objective: Upon completion of this lesson, the student will develop the ability to use the touch system on the 4-5-6-7-8 and 9 keys by completing all assigned practice exercises with 65 percent accuracy.

Complete Problems
1-5 page 2
6-10 page 3
11-20 page 4

Lesson 2:

Objective: Upon completion of this lesson, the student will develop the ability to use the touch system on the keys 0-1-2-3 and Non-Add Key by completing all assigned practice exercises with 65 percent accuracy.

Complete Problems
1-8 page 5
9-16 page 6
17-24 page 7
Trial Balance 25-26 page 8
Two-digit timed test
Multi-digit timed test

Lesson 3:

Objective: Upon completion of this lesson, the student will demonstrate the ability to use the minus key by performing the practice exercises with 65 percent accuracy

Complete Problems
Skill Drill A page 9
1-20 page 11
21-33 page 12

Lesson 4:

Objective: Upon completion of this lesson, the student will demonstrate the ability to use the Repeat Key, the Decimal Point Key, and the Subtotal Key by performing the assigned practice exercises with 65 percent accuracy.

Complete Problems
1-8 page 13
9-16 page 14
17-20 page 15
21-22 page 16

Lesson 5:

Objective: To review for Achievement Test.

Complete Problems
Skill Drill A 1-10 page 17
11-20 page 18

Complete Achievement Test 1

Lesson 6:

Objective: Upon completion of this lesson, the student will demonstrate the ability to multiply on the printing calculator and to use the decimal point on the calculator by completing the assigned jobs with 65 percent accuracy.

Complete Problems
1-10 page 19
11-20 page 20
21-35 page 21
36-40 page 22

Lesson 7:

Objective: Upon completion of this lesson, the student will demonstrate the ability to convert fractions and percentages to decimals to solve problems by completing with 65 percent accuracy the assigned jobs.

Complete Problems
Skill Drill B 1-10 page 23
1-20 page 24-25
21-30 page 26

Lesson 8:

Objective: Upon completion of this lesson, the student will demonstrate the ability to find individual sums, products and grand totals by using the memory to accumulate the numbers by completing jobs with 65 percent accuracy.

Complete Problems
Skill Drill B 1-14 page 27
15-20 page 28
21-40 page 29
41-50 page 30

Lesson 9:

Objective: Upon completion of this lesson, the student will demonstrate the ability to verify sales slips accurately by figuring extensions, totaling items, and figuring sales tax on the assigned jobs with 65 percent accuracy.

Complete Problems
Skill Drill B page 23
Sales Slips page 31-34

Lesson 10:

Objective: Review for Lessons 6-9. Study for Achievement Test 2.

Complete Problems
Skill Drill B page 23
Review Drill Jobs 1-20, page 37
21-40, page 38

Complete Achievement Test 2

Lesson 11:

Objective: Upon completion of this lesson, the student will demonstrate the ability to perform operations using a fixed decimal point in addition, subtraction, and multiplication by completing the assigned problems with 65 percent accuracy.

Complete Problems
Skill Drill C 1-10 page 39
1-10 page 40-41
11-31 page 42

Lesson 12:

Objective: Upon completion of this lesson, the student will demonstrate the ability to calculate discounts and net amounts by completing the assigned problems with 65 percent accuracy.

Complete Problems
1-10 page 43
11-20 page 44
21-35 page 45
36-50 page 46
Skill Drill C page 39

Lesson 13:

Objective: Upon completion of this lesson, the student will demonstrate the ability to multiply problems with more than two factors and with negative factors with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill C page 39
1-15 page 47
16-29 page 48
30-44 page 49
45-54 page 50

Lesson 14:

Objective: Upon completion of this lesson, the student will perform column addition by totaling sales journals with a minimum of 65 percent accuracy.

Complete Problems
1, page 51
2, page 52
3, page 53
4, page 54

Lesson 15:

Objective: Review over Lessons 11-14. Study for Achievement Test 3.

Complete Problems
1-12, page 55
13-25, page 56

Complete Achievement Test 3

Lesson 16:

Objective: Upon completion of this lesson, the student will demonstrate the ability to divide by performing the assigned problems with 65 percent accuracy.

Complete Problems
Skill Drill D, page 57 (page 61)
1-10, page 57
11-25, page 58
26-35, page 59
36-45, page 60

Lesson 17:

Objective: Upon completion of this lesson, the student will demonstrate the ability to use constants in multiplication by completing assigned jobs with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill D, page 61
1-20, pages 62 - 63
21-30, page 64

Lesson 18:

Objective: Upon completion of this lesson, the student will demonstrate the ability to multiply after obtaining a sum and to cross check business forms that have both vertical and horizontal addition.

Complete Problems
Skill Drill D, page 65 (page 61)
1-9, page 65
10-15, page 66
16-25, page 67
25-40, page 68

Lesson 19:

Objective: Upon completion of this lesson, the student will demonstrate increased production in handling business forms by completing jobs with speed and accuracy equivalent to standards established in Lesson 9.

Complete Problems

Skill Drill E, page 69 (page 77)

Sales Slips, pages 71-72

Lesson 20:

Objective: Review Lessons 16-19. Study for Achievement Test 4.

Complete Problems

Skill Drill E, page 75 (page 77)
1-10, page 75
11-30, page 76

Take Achievement Test 4

Lesson 21:

Objective: Upon completion of this lesson, the student will demonstrate the ability to calculate and use credit balances.

Complete Problems:
Skill Drill E, page 77
1-15, page 79
16-17, page 80

Lesson 22:

Objective: Upon completion of this lesson, the student will demonstrate the ability to find the percentage of increase or decrease and find the amount of markup or markdown by completing assigned problems with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill E, page 81 (page 77)
1-10, page 81
11-20, page 82
21-30, page 83
31-40, page 84

Lesson 23:

Objective: Upon completion of this lesson, the student will demonstrate the ability to prorate an amount and to divide using a constant divisor by completing the assigned problems with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill F, page 85 (page 89)
1- 5, page 85
6-15, page 86
16-35, page 87
36-50, page 89

Lesson 24:

Objective: Upon completion of this lesson, the student will demonstrate the ability to check deposit slips using touch addition by completing the assigned jobs with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill F, page 89
1-2, page 91
3-4, page 92

Lesson 25:

Objective: Review Lessons 21-24. Study for Achievement Test 5.

Complete Problems
Skill Drill F, page 93 (page 89)
1-12, page 93
13-24, page 94

Take Achievement Test 5

Lesson 26:

Objective: Upon completion of this lesson, the student will demonstrate the ability to find the amount of interest charged on a loan by completing the assigned problems with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill F, page 95 (page 89)
1- 5, page 95
6-18, page 96
19-31, page 97
32-33, page 98

Lesson 27:

Objective: Upon completion of this lesson, the student will demonstrate the ability to find the last day that a cash discount can be taken and to find the amount of the cash discount by completing the problems assigned with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill G, page 99
1-4, page 101
5, page 102

Lesson 28:

Objective: Upon completion of this lesson, the student will demonstrate the ability to find chain discounts with and without chain discount net equivalent tables by completing the problems assigned with a minimum of 65 percent accuracy.

Complete Problems
Skill Drill G, page 103
1- 8, page 103
9-11, page 104
12-24, page 105
25-27, page 106

Lesson 29:

Objective: Upon completion of this lesson, the student will demonstrate increased production in handling business forms by completing jobs with speed and accuracy as established by the instructor.

Complete Problems
Skill Drill G, page 107
Sales Slips, pages 109 and 111

Lesson 30:

Objective: Upon completion of this lesson, the student will review Lessons 26-28. Study for Achievement Test 6.

Take Achievement Test 6

EVALUATION

Achievement tests are given at the end of each unit, however, a post-test may be given if so desired by the instructor.

MACHINE ROTATION

Introduction

The business education department has several office machines which students might encounter when filling a position in an office. This part of secretarial and clerical procedures is set up on a rotation plan and each student must complete all units of work. These units of study are on an individualized basis, however, the instructor will assist individual students at any time when help is needed. Students may repeat any of the projects they do not complete to their own satisfaction if time permits. Additional practice can occur on certain machines during the advanced B.O.E. (Business and Office Education) class. A machine rotation schedule is posted and individual guides for each machine are made available to each student in order that the student may plan the work. Each unit has a different evaluation method set up by the instructors.

SPECIALIZED UNITS AND EQUIPMENT

1.	Correcting Selectric	This machine is not difficult to operate, however, it has been incorporated into the rotation in order to give each student some practice on it. At the same time the student gains some experience in insurance and medical word while completing short units on each area.
2.	Electronic Typewriter	
3.	Memory Typewriter	
4.	Microcomputer	
5.	Transcriber	
6.	Payroll	A payroll practice set is incorporated into this rotation in order to balance out time periods.
7.	Reprographics	
8.	Punctuation Program	(Appendix A and B)

IBM CORRECTING SELECTRIC III UNIT

I. Introduction

The correcting selectric typewriter is an IBM typewriter like others in the classroom with the exception of three features:

1. Correcting feature
2. Dual-pitch feature
3. Carbon ribbon

The correcting feature allows you to backspace with the special backspace key (X) and lift-off an error. The dual-pitch feature allows typing with either a pica or elite element on the machine. Many offices are now buying typewriters with correction features because of the time saved in erasing errors and with the dual-pitch, it is two typewriters in one.

II. Objectives

1. To learn the operation of the correcting selectric typewriter in order to have knowledge of this equipment when entering the job market as demonstrated by the ability to type various problems from an insurance office using the typewriter.

2. To learn to type forms from an insurance office as demonstrated by the ability to type mailable copies of a list of paid-up policies, form letters, invoices, letter with blind copy notation, and a quarterly report.

III. Materials

1. Correcting selectric instruction sheet
2. Century 21 Typewriting textbook
3. Typing paper
4. File folder for materials and completed work
5. Invoices

IV. Instructions

1. Read the complete instruction sheet before beginning to work.

2. Ask the instructor to show you how to use the correcting feature (or a student who has completed this unit), and the dual-pitch feature of the machine.

3. Type the problems given in Unit 50, Insurance Office Typing, Lessons 280C - 282 C, pages 432 - 435 of the Century 21 Typewriting textbook. All jobs should be mailable. You will be working as a clerk-typist in the Hartford district office of the Centennial Insurance Company.

4. Type the problems given in Unit 53, Medical Office Typing, Lessons 293B - 295B, pages 448 - 454. All jobs should be mailable. You will be working in the office of the LaSalle Medical Center.

5. Keep a folder of your work. At the end of the time period, please turn in your folder of completed work.

6. PROOFREAD!!!

V. Evaluation

Each problem submitted is evaluated on the basis of mailability using the following grading scale.

0 errors - A
1 error - B
2 errors - C
3 errors - D
4 errors - F

An average is then obtained and this average is the grade received for this unit of work.

IBM ELECTRONIC TYPEWRITER UNIT

I. Introduction

This book is a "self-paced program" written so that you can teach yourself to use the IBM Electronic Typewriter. It is divided into four sections:

Basic Information
Operating Procedures
Special Instructions
Applications

In addition to the book, there is a set of instruction cards attached beneath the typewriter. These cards will be used along with the book as part of your training. After training is completed, these cards can be used as a Quick Reference. (Some of the pages may be missing.)

Now. . . you are ready to read the remainder of this instruction sheet and begin work!

II. Objective

The purpose of this unit is to learn the operating parts of the IBM Electronic Typewriter and advance through the instruction book in order to have a working knowledge of this equipment when entering the job market.

III. Materials

1. Instruction sheet for IBM Electronic Typewriter
2. Instruction book for IBM Electronic Typewriter
3. Typing paper
4. Century 21 Typewriting Textbook, Second Edition
5. File folder to keep materials and completed work

IV. Instructions

1. Quickly glance through all of the following instructions before beginning to work so that you will have an overview of the entire project.

IBM Electronic Typewriter Unit Con't

2. Read the introductory section of the IBM Electronic Typewriter book.

3. Read every page. The information is presented in small, easy steps with instructions to do shown in a boxed area. Follow the procedure READ and DO (what the instructions tell you), advancing as far as possible in the time period. PROOFREAD!

4. A folder should be kept for all the exercises you type. The last day of your time period on the IBM Electronic Typewriter, you should turn in this folder with completed work and instruction sheet to your instructor.

V. Points to Remember

1. Follow the instructions exactly as they are given. Repeat an exercise if it will help you learn.

2. Review any time you wish. You should be confident of the previous material before going ahead.

3. If you have a question:

   a. Use the instruction book as a reference.

   b. Use the instruction cards located beneath the typewriter.

   c. If you do not find the answer, call for the assistance of your instructor.

VI. Evaluation

Completed exercises are evaluated on the basis of ability to follow instructions correctly. Evaluation is also based on the amount of material covered.

VII. Supplementary Problem

Type 290c-292c, Job 1, page 444. Use the proportional spacing element only and use good judgment in determining date placement and format of letter.

MEMORY TYPEWRITER UNIT

I. Introduction

Have you ever thought about how much easier your typing job would be if you do not have to stop and make a correction or start over because of a typographical error? How many times have you had to retype a letter because someone made a change or there was an error you did not catch? Do you ever have to type more than one original?

With the memory typewriter, all these typing tasks are eliminated. You simply backspace and retype to correct an error. The typewriter produces erasure-free originals--as many as you need. You can make changes instantly and without retyping an entire page.

How is all this possible? This typewriter is more than a typewriter. It has a memory. As you type, the material that appears on the paper also goes into the typewriter's memory. This typewriter also provides a way for you to store what you type so you do not have to type it again if you need it later for another original or when there are changes.

Now. . . you are ready to read the remainder of this instruction sheet and begin work!

II. Objectives

To learn the operating parts of the memory typewriter and advance as far as possible in the instruction book in order to have a working knowledge of this equipment when entering the job market.

III. Materials

1. Memory typewriter instruction sheet
2. Memory typewriter instruction book
3. Clipboard--Record sheet for memory bank storage
4. Typing paper
5. Folder for materials and work

IV. Instructions

1. Read all of the following instructions before beginning to work.

2. Read the introductory section of the memory typewriter book.

3. Follow the instructions step by step in the book following the procedure READ and DO (what the instructions tell you), advancing as far as possible in the time period.

4. When the book instructs you to store something in "memory" be sure to check the chart on the clipboard beside the typewriter so you will not store over someone's work and erase it. Choose a number not in use, store your material on that number and enter your name and information required on the chart.

5. A folder should be kept for all the exercises you type. The last day of your time period on the memory typewriter, you should recall everything you have stored in memory, play it back (each exercise on a sheet of typing paper), staple these pages together and turn them in with your folder to your instructor.

V. Points to Remember

1. Anything typed into the machine will be erased if you turn the machine off before storing in an assigned memory bank.

2. Items you don't want stored in memory should be typed with the typewriter button down.

VI. Evaluation

Completed exercises are evaluated on the basis of ability to follow instructions correctly. Evaluation is also based on the amount of material covered.

MICROCOMPUTER

I. Introduction

Have you ever thought about how much easier your typing job would be if you do not have to stop and make a correction or start over because of a typographical error? How many times have you had to retype a letter because someone made a change or there was an error you did not catch? Do you ever have to type more than one original??

With the microcomputer all these typing tasks are eliminated as you learn to insert, delete, rearrange, store, and print information in a document. The microcomputer produces erasure-free originals--as many as you need.

How is all this possible? The microcomputer is similar to a typewriter with a T.V. screen above it that allows you to view and edit the material as you type or . . . . after you finish typing the document.

Material can be stored on floppy disks that look like soft 45 RPM records. The information stored on these floppy disks can be stored and then recalled and printed on a letter-quality printer in a matter of minutes.

This may all sound very confusing, but just relax, read the remainder of this instruction sheet and begin work!

II. Objectives

1. At the end of this unit, the student should be able to initialize a diskette.

2. At the end of this unit, the student should be able to load a program into the microcomputer.

3. At the end of this unit, the student should be able to save information by placing it on a diskette.

4. At the end of this unit, the student should be able to format and edit a letter, memorandum, or manuscript.

5. At the end of this unit, the student should be able to print a letter on the letter-quality printer.

III. Materials Needed

1. Instruction Sheet
2. WordPro 4 Instruction Book
3. Microcomputer (Computer is marked on top--Word Processor)
4. WordPro 4 Plus Systems Diskette
5. Floppy Disk
6. Dual Disk Drive
7. Paper
8. Printer and Paper

IV. Instructions

1. Read all of the following instructions before beginning to work.

2. Read the following sections from the WordPro and perform those exercises listed.

   a. Read Section 1, Introduction, pages 1-1--1-6.

   b. Read Section 2, Getting Started, pages 2-1--2-14. Also, perform the exercises given. Some of this information may be presented by the instructor if time permits.

   c. Section 2, Lesson 5, pages 2-15--2-17, Reference pages

   d. Read and do exercises, Section 2, Lesson 6, pages 2-18--2-22.

   e. Read and do Section 3--WordPro 4 Plus Functions, pages 3-1--3-26.

   f. Read and do Section 4--Editing Text, pages 4-1--4-15.

   g. If time permits, student may continue with Section 5, Advanced Functions, pages 5-1--5-35, and also continue through additional special functions and training if so desired.

   h. Upon completion of Section 4, complete the three attached problems using the microcomputer.

   i. A folder should be kept for all the exercises completed. Staple all exercises together and submit them to your instructor on the last day you are scheduled to work on the microcomputer. If all work is completed early, submit your work at that time.

   j. IF AT ANY TIME YOU DO NOT UNDERSTAND THE INSTRUCTIONS GIVEN IN THE TEXT, ASK FOR ASSISTANCE!!!!!

V. Points to Remember

1. BEFORE YOU TURN ON THE POWER to the Dual Disk Drive, make sure that there are NO DISKETTES in either of the drives.

2. NEVER turn your system on or off with diskettes in the drives.

3. Do not set diskettes on top of magnetic devices or equipment with motors because these could damage information stored on diskettes.

4. Fingerprints can mar reading of a diskette, therefore, do not handle the diskette on the slot opening of the protective sheath.

5. When not in use, place diskette in envelope.

6. Keep diskettes in plastic box to keep smoke, dirt, and dust from collecting on the surface of the diskette.

7. Insert diskette with label FACING DOWN (Model CBM 8050) and the notched edges toward the rear of the unit.

8. Label each diskette by affixing pre-typed or pre-written labels. Use a soft-tip pen to write on labels already on diskettes.

9. When turning on power to disk drive unit, be sure lights go off after a second or two. If they do not, turn power off and then on again. If they remain lighted, call instructor.

10. To load WordPro 4 Plus program from the diskette into the computer, depress "shift" key and "run/stop" key simultaneously or type load"*",8 Return .

VI. Evaluation

The student will be evaluated on the basis of mailability of completed work. The minimum work which may be submitted for evaluation will be a printout of the exercise on page 3-15. One letter grade will be deducted for each uncorrected error.

Upon completion of Section 4, students should complete as many of the attached three problems as possible for additional practice and as supplementary work.

PROBLEM 1 Keyboard the following interoffice memorandum into the microcomputer in correct format. After keyboarding in the material, edit the information and print out a copy.

To: All Medical Staff Members From: Dennis I. Showalter, Chief Medical Services Date: May 19, 19-- Subject: Monthly Staff Conference

The monthly meeting of the medical staff will be held on June 1 at 7:30 p.m. in the conference room. The agenda for this meeting will include: 1. Administrative Processing of Patients 2. Control of Dangerous Substances 3. Scheduling of the Operating Room 4. Plans for Expansion

If you have any additional topics you wish to discuss at the meeting, please submit them in writing to my office by May 24.

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PROBLEM 2 Using this information and the format style on page 450 of the typewriting textbook, prepare a Report of Operation. Print one copy. The surgeon on this particular case was Jon C. Wilcox, M.D. There were two assistants--Juan Martinez, M.D. and L.T. Schultz, R.N.

LaSalle Medical Center
2010 TULANE AVENUE
NEW ORLEANS, LA 70112

PATIENT NAME (LAST, FIRST)	Roche, Robert C.	OCC	Student
ADDRESS (IF DIFFERENT FROM SUBSCRIBER'S)		EMP	
HOSPITAL NUMBER	372,194		
HOME PHONE	482-4639		
SUBS NAME	Charles P. Roche		
ADDRESS	2815 Pauger Street		
CITY & STATE	New Orleans, LA 70119	OCC	Lineman
EMP & OCC		EMP	Louisiana Power & Light Company
NEAREST REL	Charles P. Roche	ATT. PHYS.	Dr. Jon C. Wilcox
REL TO PAT	Father	ATT. PHYS.	Dr. C. C. Black
HOME PHONE	482-4639 WORK PHONE 370-8720	ROOM NO.	412
		RATE	$75

BIRTH DATE	AGE	SEX	M S	RELIGION	HOW ADMITTED	DATE ADM	TIME		DATE DIS		TIME	
4/2/64	13	M	S	Catholic	Father	4/11/77	8:30	PM	4/13/77		AM	1:30

INS. COMMERCIAL COMP.	INDIV	GROUP	INS. GROUP NO.	INS. AGREEMENT NO.	MALE: SELF	HUS.	SON X	FEMALE: SELF	WIFE	DAUG.
Blue Cross		X	9001-A	141 01 2242						

PROVISIONAL DIAGNOSIS

Diseased tonsils

FINAL DIAGNOSIS

Diseased tonsils

COMPLICATIONS

None

OPERATIVE PROCEDURES

Tonsillectomy; adenoidectomy

PROCEDURE: Under local anesthesia, the patient was prepared and draped in a supine position. The left hypertrophied tonsil was retracted medially and a superficial incision was made along the anterior and posterior tonsillar pillar. Connective tissue of the tonsil was dissected free with a freer elevator. A snare wire was drawn into the cannula, and the tonsil was removed in the usual fashion. In a similar manner, the opposite tonsil was removed. After this procedure was completed, both tonsillar fossae were injected with a mixture of Depo-Medrol, Depo-Cer-O-Cillin, and 2% Xylocaine. Inspection of the nasopharynx revealed adenoidal tissue. Using curved adenoid curettes and LaForce adenotomes, the adenoidal tissue was removed. The remaining tissue was packed with a sponge to control bleeding. The mouth and throat were suctioned. After a few minutes, the sponge was removed. Approximate blood loss: 30 cc's. One figure-of-eight suture was placed in the left posterior tonsillar pillar. The patient tolerated the procedure well.

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PROBLEM 3 Using proofreader's marks as illustrated in the first line of this document, correct the remainder of the report. A list of proofreader's marks is on page ix of the typewriting textbook. After correcting, enter the information into the microcomputer, edit and print one mailable copy. 60

CONSENT FOR ADMISSION TO LASALLE MEDICAL CENTER

I do hereby consent to hospital care, diagnostic examinations and procedures, and to such medical, surgical, and anesthteic procedures as may be deemed necessary or advisable by the doctors nameed below or others asin the treatment of my case designated by them. I acknowledge that no guarantee has been made to me as the result of such treatment.

I consent to the release of information for this admission to my Insurance Company for the completion of my hospitalization claim. This information has been fully explained tome, and i certify that I understand it's contents.

Name of patient_____signature_____

Signature of nearest relative_____Relationship_____

Witness_____

Doctors: Referring_____

Attending_____

LaSalle Medical Center

2010 TULANE AVENUE
NEW ORLEANS, LA 70112

LAST FIRST

PATIENT NAME | OCC | HOSPITAL NUMBER

ADDRESS (IF DIFFERENT FROM SUBSCRIBER'S) | EMP | HOME PHONE

SUBS NAME

ADDRESS

CITY & STATE

TWP & CO | OCC | EMP

NEAREST REL | DRS | ATTN'LF | ROOM NO | RATE

REL TO PAT

HOME PHONE | WORK PHONE

BIRTH DATE	AGE	SEX	M S	RELIGION	HOW ADMITTED	DATE ADM	TIME AM	PM	DATE DIS	TIME AM	PM

BC	COMMERCIAL	COMP	INDIV	GROUP	B/C GROUP NO	B/C AGREEMENT NO		MALE SELF 1	MALE HUS 2	MALE SON 3	FEMALE SELF 4	FEMALE WIFE 5	FEMALE DAUG 6

PROVISIONAL DIAGNOSIS

FINAL DIAGNOSIS

COMPLICATIONS

OPERATIVE PROCEDURES

DISCHARGE SUMMARY

TRANSCRIBING MACHINE UNIT

I. Introduction

The purpose of this two-week training period using transcribing equipment is to give the student an opportunity to develop basic transcribing skills. Some students will progress at a much more rapid pace than others but all students will be expected to develop the ability to produce mailable work when producing the first copy.

II. Objectives

Upon completion of this unit, the student will have demonstrated the ability to:

1. Operate transcribing equipment by producing mailable jobs.
2. Proofread and set up jobs correctly on the page as shown by the work submitted for evaluation.
3. Follow instructions as demonstrated by work submitted for evaluation.
4. Apply correct grammar, spelling, and punctuation as shown by work submitted for evaluation.

III. Materials

1. Typing paper
2. Correction material--eraser, correction tape, etc.
3. Folder--to keep completed work
4. Handout--Tips for Machine Transcription

IV. Instructions

1. Read this entire instruction sheet.
2. Locate a transcriber and set it up at your work station.

3. Obtain appropriate media for your transcriber (mini-cassette--Norelco--Teacher's Desk or standard cassette--Lanier--Teacher's Cabinet).

4. Read attached instructions on Tips for Machine Transcription. Use this as a reference sheet.

5. Follow instructions as given on the tape to set up each job. If no specific instructions are given, use any reference book in the classroom to determine an acceptable format for the job you are typing.

6. Begin transcribing. Transcribe all jobs and correct errors in each complete job except for the first two. The first two jobs are for practice in becoming familiar with the equipment and procedures of transcribing.

7. On the Lanier tapes, disregard any reference made to the manual.

8. Jobs to be completed:

   a. Norelco tapes--Sides 1 and 2
   b. Lanier tapes--Tape 2-A, see instructor for additional assignments.

9. You will work either with the Norelco transcriber or the Lanier transcriber but not both unless time permits.

10. Label each job as you type. Example:

    Norelco--Side 1, Job 1 or
    Lanier--Side 1, Job 1

11. All jobs must be mailable. PROOFREAD!!

12. DO NOT WASTE ANY TIME. No job should be retyped more than once. Turn in all completed jobs at the end of the rotation period in your folder.

IV. Evaluation

Students must type jobs in mailable copy. For each uncorrected error found in a job, the grade will be lowered 1/2 step (example--one error, A-; two errors, B). Students are expected to complete 14 jobs. For each untyped job, the student will receive a zero. The letter grades assigned to each job will be averaged to arrive at a final grade for transcribers.

TIPS FOR MACHINE TRANSCRIPTION

Handout

Look--Listen--Type

Machine transcription is an important skill for today's secretary. More and more businesses are finding dictation and transcription equipment to be the answer to their communication needs. The person who knows the proper techniques of transcription has an additional skill to add to the list of qualifications when applying for a job. This skill provides an added degree of professionalism in the role of a secretary.

To make machine transcription as effective as possible, you must know the equipment you will be using. Most dictating equipment manufacturers supply literature for both the dictator and the transcriber, with proper instructions for using their equipment. Read the instruction book carefully and keep it in a convenient place. Learn the mechanics of operation. You will become proficient in transcribing through practice.

The efficient transcriber knows that the secret of good transcription is Look, Listen, and then Type.

Continuous Typing

Your goal in transcribing is continuous typing. You can achieve steady typing by proper use of the Foot Pedal, as follows:

1. Listen to an earful.
2. Release the Foot Pedal, but continue to type the phrase.
3. As you type the last part of the phrase, begin listening to the next phrase so that you can continue typing without a pause.

You will find that with practice you can operate the Foot Pedal with such ease that you are always listening ahead of the material you are typing. You will then have achieved continuous typing.

Using Automatic Word Recall

The tape will stop rotating when you release the pressure on the Foot Pedal. When you depress the Foot Pedal again to resume listening, you will hear the next words on the tape or you may hear several of the words from the last earful repeated. The amount repeated depends on where you have the Automatic Word Recall set. As many as four or five words may be repeated, or perhaps none at all. During the first several weeks while you are learning to transcribe, you will be able to reduce the number of words you need repeated for each depression of the Foot Pedal.

Reviewing

There will be times when you need to have more than a few words repeated. You may want to listen again to a sentence or two, or perhaps review part of the earlier dictation if there is a phrase that was hard to understand. To review the recording, depress the left side of the Foot Pedal (tap it). This is the Review position and will cause the Scanner to move back. Then when you depress the right side of the Foot Pedal, you will hear the last six seconds, or about ten words, of the recording repeated.

To repeat more than this, tap the left side of the Foot Pedal several times, or move the Scanner to the left by hand (if your machine has one), and then listen.

Transcribing Letters

A letter may misfire--may fail to accomplish its purpose--even though it is clearly and persuasively worded. To hit its target it must be perfectly typed. That means it must be clean, neat and attractively placed on the page. It must be consistent in its style. And it must be correctly spelled and punctuated.

Meeting these high standards is the secretary's job. She needs to know how to set up and arrange a letter to give it that well-groomed look. Her final checkup should yield a firm yes to each of these questions:

1. Does the letter have good margins?
2. Is it free from detectable erasures?
3. Is it free of smudges, fingerprints or strikeovers?
4. Are the paragraphs well balanced?
5. Has correct word division been observed?

6. Has it been carefully proofread for spelling and punctuation?

7. Is is free of senseless sentences or doubtful meanings?

8. Are abbreviations, if any, correctly used?

All of this effort is worthwhile. As a representative of your company, the letter you type should give your reader a good first impression of your company--its efficiency, its high standards, its interest in him--with the implication that it will display the same good qualities in all its dealings.

PAYROLL UNIT

I. Introduction

The purposes of this unit are to give the student an understanding of the preparation of a company payroll for two two-week periods and completion of the necessary reports and records that accompany it. The student will use an individualized payroll clerk training manual, working papers, and the microcomputer.

II. Objectives

Upon completion of this unit of study, the student will be able to:

1. Compute regular and overtime hours worked using simulated time cards with 100% accuracy.
2. Compute regular and overtime wages, using hourly rates, with 100% accuracy.
3. Compute FICA and Income Taxes on wages by using tables provided with 100% accuracy.
4. Write payroll checks and accompanying vouchers accurately.
5. Prepare payroll summary reports with 100% accuracy.
6. Keep an up-to-date employee earnings record for all employees from the payroll summary report with 100% accuracy.
7. Demonstrate understanding of total payroll procedures by completing a findings test with 65% accuracy.
8. Prepare payroll records and reports by entering hourly wages into a computer and running the program to compute and print out special reports and checks.

III. Materials

1. Manila envelope to hold all supplies
2. Three file folders
3. Gregg Payroll Clerk Training Manual
4. Gregg Payroll Clerk Resource Materials
5. Microcomputer Payroll Program Diskette

IV. Instructions

1. Read the entire instruction sheet.

2. Obtain supplies from the instructor.

3. Read inside front cover of the Gregg Payroll Clerk Resource Materials and complete the exercises according to the instructions.

4. Follow the instructions step by step given in the Gregg Payroll Clerk Training Manual to complete the office job training program for Jobs 1-17.

5. Job 18--Compute payroll hours manually. Obtain payroll program diskette and load payroll program into microcomputer. Follow instructions as given on microcomputer screen.

6. Do not hesitate to ask for clarification of instructions or assistance if you do not understand directions.

V. Points to Remember

1. Be sure that a complete and accurate record is kept of your work on the work log sheet. The instructor should initial and check Jobs 2, 14, 15, 17, and 18 BEFORE you continue to the next job.

2. Work can be checked for accuracy by referring to the Master Payroll Record at the back of the Training Manual. However, make sure you use this as a checkpoint ONLY! Do not simply copy answers or your work will be incomplete.

VI. Evaluation

There will be two payroll registers checked during the duration of the office job training program as well as Jobs 2, 14, 15, 17, and 18. At the conclusion of the practice set a findings test will be given to evaluate the accuracy of the work. The test should be completed with a minimum of 65% accuracy. Also, printouts of your payroll reports will also be submitted for evaluation.

REPROGRAPHICS UNIT

I. Introduction

There are numerous copying and duplicating processes which may be used in an office. Some of these processes will be discussed in the reading material in this unit of study. Further opportunity will be provided the student to become aware of a few of the processes by having the student prepare a stencil, master, transparency, and a copy prepared from a photocopying machine.

II. Objectives

Upon completion of this unit, the student will have demonstrated the ability to:

1. Complete a written test on reprographics with a minimum of 65% accuracy.
2. Define the various copying and duplicating processes discussed and know when they should be used.
3. Cut a stencil.
4. Type a master unit.
5. Operate a mimeograph duplicator.
6. Operate a fluid duplicator.

III. Materials

1. Stencil, film sheet, backing sheet
2. Stencil correction fluid
3. Paper clip
4. Stencil cement (if needed)
5. Master unit
6. Razor blade
7. Century 21 Typewriting Textbook, Second Edition

IV. Instructions

1. Read all of this instruction sheet.

2. Gather supplies and textbooks needed.

3. WORK RAPIDLY OR YOU WILL NOT FINISH.

4. Read Unit 10, Parts 1 and 2, pages 358-379 in Secretarial Office Procedures textbook.

5. Using typing book, Century 21, type Job 5, page 430, pages 1 and 4 of program on a stencil. Instructions for typing a stencil are on pages 371-375 in Secretarial Office Procedures textbook. This will also be pages 1 and 4 of your program.

6. Using Century 21 Typewriting textbook, type pages 2 and 3 of program given in Job 5, page 430 of typing textbook on a master unit. Instructions for preparing a master unit are on pages 376-378 in Secretarial Office Procedures textbook. This will be pages 2 and 3 of your program.

7. See instructor for duplicating master unit on fluid duplicator.

8. See instructor for duplicating stencil on mimeograph duplicator.

9. Staple booklet together in correct order. Turn in one copy for grading. You are responsible for proofreading.

10. Study both units for written test.

11. Take written test on Unit 10.

V. Evaluation

1. Booklet will be evaluated on format and accuracy. One letter grade will be deducted for each error. This will be 50% of your reprographics grade.

2. Completion of written test on reprographics with 65% accuracy. This will be 50% of your reprographics grade.

PUNCTUATION PROGRAM

I. Introduction

This program is a brief review of basic punctuation rules. The student should follow the instructions found on the attached sheet in loading the program and working through the exercises.

Any one of the three computers may be used to work through this program. All exercises listed on the Directory must be completed. Upon completion of each exercise, the screen will indicate the number of correct responses and the length of time taken to complete the exercise. The student should work through each exercise until a minimum of 90 percent accuracy is achieved. The student should call for the instructor at the end of each exercise in order for the instructor to record the student's score.

II. Objectives

Upon completion of this program, the student will have demonstrated the ability to:

1. Load a program into the computer.
2. Call up a program directory.
3. Load a specific program from the directory into the computer.
4. Apply basic punctuation rules.

III. Materials

1. Punctuation program instruction sheet
2. Punctuation program disk

IV. Instructions

1. Read introduction and instructions
2. Obtain Punctuation Program Disk
3. Read and follow the instructions given on the attached sheet to load program into computer.

4. Load and run the first exercise ("1") shown on the Directory following the instructions given on the instruction sheet.

5. Upon completion of the complete exercise, call for instructor to record score.

6. If 90 percent accuracy is not achieved on the drill, repeat the entire drill before checking with instructor.

7. After checking with instructor, load next punctuation exercise and continue following steps 5, 6, and 7 until all punctuation exercises are completed.

7. Please ask for instructor assistance at any time. GOOD LUCK!

LOADING INSTRUCTIONS FOR THE PET--DISK

Punctuation Series

1. If you have not used the computers before, please ask for assistance in operating equipment.
2. Turn computer on.
3. Turn disk drive on.
4. Put disk in Drive 0.
5. Depress SHIFT key and RUN/STOP key simultaneously (at the same time).
6. Depress RETURN key (this loads the program into the computer).
7. Type ↑m*
8. Depress RETURN key (this loads and runs the Micro-Ed Ready program)
9. Type >$0 (this shows disk directory)
10. To load and run any program on the disk, type the up-arrow (↑) plus the name (number) of any program, and an asterisk (*). Then depress RETURN key.
11. DO NOT TURN OFF EQUIPMENT WITH DISK IN THE DRIVE!
12. If you do not complete exercises and must come back at a later time, you must follow the same steps in loading the program and calling up the Directory as have been given in Steps 2-10.
13. REMEMBER--DO NOT TURN OFF EQUIPMENT WITH DISK IN THE DRIVE. REMOVE DISK FIRST THEN TURN OFF EQUIPMENT.

BANK RECONCILIATION PROGRAM

Instruction Sheet

I. Introduction

This program was designed to demonstrate the use of the microcomputer in keeping financial records. The student should follow the instructions found on the attached sheet in loading the program and working through the exercises.

Any one of the three computers may be used to work through this program. All instructions should be completed. At the end of the instructions, the computer will produce a printout of the bank statement. This bank statement should be given to the instructor for evaluation purposes.

II. Objective

Upon completion of this program, the student will have demonstrated the ability to:

1. Load a program into the computer.
2. Reconcile a checkbook balance with a bank statement by using a microcomputer and produce a printout.

III. Materials

1. Bank Reconciliation Program instruction sheet
2. Bank Recon Program diskette

IV. Instructions

1. Read introduction.
2. Obtain Bank Recon Program diskette.
3. Turn on equipment.
4. Insert diskette in Drive 0.
5. Key in poke 59468,12 and depress RETURN.
6. Key in dload "bank recon" and depress RETURN. This loads the bank reconciliation program.

7. Key in run and depress RETURN.

8. Screen will display words CHECKBOOK BALANCE.

9. Read and follow instructions given on screen.
Example: PRESS SPACE BAR TO CONTINUE.

10. Beginning checkbook balance enter $3,210.34.

11. Enter deposits. Enter zero (0) when completed.
Press RETURN after each entry.

Deposits:
350.00
1,325.50
869.00
1,140.40
890.40

12. Screen will display total deposits. Depress SPACE BAR to continue. Enter checks and any other bank charges. Enter a zero (0) when completed.
Press RETURN after each entry.

Checks:
50.45
15.25
425.00
125.34
156.75
89.90
111.20
24.50
149.00
345.30
31.49
29.45
75.60
105.43
45.00
19.50
23.45
154.19
45.67
15.32

13. Depress SPACE BAR. Screen displays totals.

14. Depress SPACE BAR. Enter bank statement balance.
Enter 5,936.86. Depress RETURN.

15. Enter a deposit not credited to bank statement.
If there are none, enter zero (0) and depress RETURN.

16. Press SPACE BAR to continue.

17. Enter outstanding checks. Enter a zero (0) when completed. Press RETURN after each entry.

    Outstanding checks: 19.50
    154.19
    15.32

18. Printer should automatically begin printing bank reconciliation.

19. If bank statement does not balance, see instructor for assistance.

20. If bank statement is in balance, turn in the printout of your bank reconciliation for evaluation.

21. Remove diskette from disk drive.

22. Turn off all equipment and clean up work area.

V. Evaluation

Printout will be graded for accuracy to determine a grade. Amount of assistance needed will also be used as a determining factor in grading.

PRETEST

BANKING UNIT

1. List three ways a bank serves its customers other than keeping their money safe.

   1. _____

   2. _____

   3. _____

2. Change these numbers to decimals.

   a. 85% _____

   b. 103% _____

   c. 8% _____

3. Define the term "gross pay." _____

   _____

4. Define the term "net pay". _____

   _____

5. List three items that would be classified as "deductions" from a person's paycheck.

   1. _____

   2. _____

   3. _____

6. What is a "signature card"? _____

   _____

7. There are checking accounts available other than individual accounts. Name some of them.

   1. _____

   2. _____

   3. _____

8. Complete the deposit slip below with the following information: Deposit 2 rolls of pennies, 1 roll of dimes and 25 quarters that you have been saving; on the same deposit slip also deposit check #134 in the amount of $64.35. The account number is 75-197-66.

For DEPOSIT to the Account of
LOUIS JASON

Date _____ 19____

County National Bank
New York, NY

Subject to the Terms and Conditions of this Bank's Collection Agreement

	Dollars	Cents
BILLS		
COINS		
Checks as Follows Properly Endorsed		
TOTAL DEPOSIT		

⑈0830⑆ ⑆243⑈676⑈

9. Complete the check below in the proper manner. The check should be written to RUTLEDGE SAVINGS AND LOAN for $1,463.91. Use today's date and your signature.

LOUIS JASON

NO. 101

1-830
260

Date _____

PAY TO THE ORDER OF _____ $ _____

_____ Dollars

County National Bank of New York, NY

_____

⑆0260⑈0830⑆ ⑆243⑈676⑈

10. Give an example of a "blank endorsement" for the back of a check.

11. Give an example of a "restrictive endorsement" for the back of a check.

12. Give an example of a "full endorsement" for the back of a check.

13. Complete the following bank reconciliation. Show calculations below.

Your account balance is shown as $514.13 on your bank statement. Your check register shows a balance of $247.98. Comparing cancelled checks with your check register, you find that outstanding checks are as follows:

Check #110 in the amount of $56.14
Check #112 in the amount of $100.00
Check #116 in the amount of $110.00
Check #119 in the amount of $2.50

All of your deposits are listed on your statement, so there are no outstanding deposits. A service charge in the amount of $2.49 was withdrawn from your account by the bank. Assume that there are no errors in your check register.

Bank Reconciliation Statement	
Checkbook Balance	**Bank Balance**

14. What correction should be made if a check for $139 had been entered in the checkbook register as $193.00

15. What correction should be made if a check for $139 had been entered in the checkbook register as $130.

16. A deposit of $235.87 has been entered as $253.87 in the checkbook register. How should this error be corrected?

CHECKBOOK BALANCE = 3210.34

TOTAL DEPOSITS = 4575.3

CHECK TOTAL = 2037.79
FINAL CHECKBOOK BALANCE = 5747.85

BANK STATEMENT BALANCE = 5936.86

DEPOSITS NOT CREDITED = 0

OUTSTANDING CHECKS = 189.01

FINAL BANK STATEMENT BALANCE= 5747.85

OUT OF BALANCE BY -1.90734863E-06

FILING PROGRAM

Instruction Sheet

I. Introduction

This program is designed to demonstrate the advantage of using a microcomputer for alphabetizing a list of items or names compared to doing the alphabetizing manually. The student should follow the instructions for loading the program into the computer and working through the program.

Any one of the three computers may be used to work through this program. After completion of the program, the student should produce a printout of the completed exercise to turn in to the instructor for evaluation.

II. Objectives

Upon completion of this program, the student will have demonstrated the ability to:

1. Load a program into the computer.
2. Alphabetize a list of 50 names using the microcomputer and produce a printout of the alphabetized list.

III. Materials

1. Filing Program instruction sheet
2. Alpha program diskette
3. Exercise 34 in Gregg Quick Filing Practice Set

IV. Instructions

1. Read introduction and objectives.
2. Obtain materials needed.
3. Insert Alpha program diskette into Drive 0.
4. Key in poke 59468,12 and depress RETURN.
5. Key in dload "alpha" and depress RETURN.

6. Key in run and depress RETURN.

7. Computer is now in program. Screen will display Alphabetize. Type in each item to be alphabetized and depress RETURN after each item. To end list enter @ and RETURN. When entering each item, names, etc. must be entered in the order that each unit will be considered.

   Examples: Lila Carter

   Enter into computer Carter Lila

   Hotel of Newport

   Enter into computer Newport Hotel

8. Computer will print on screen "Do you want a printout?" Type in the word yes and RETURN.

9. Computer will print on the screen "Title of List?" Type in your first and last name and Job 34 and depress RETURN.

10. Computer will automatically printout the list you have typed and it will be in alphabetical order.

11. Turn in printout to your instructor for evaluation.

12. Remove Alpha diskette from disk drive.

13. Turn off all equipment and clean up your work area.

V. Evaluation

Evaluation will be based on number of items correctly alphabetized on printout. There are a total of 50 items to be keyed into the machine. Students must receive a grade of 65% or above.

QUICK FILING JOB 34 KEY

A B INCORPORATED
AIR COMFORT INCORPORATED
AMES-BEAMAN LAURA S
AMES-WEBB LORRAINE
ARTHUR'S AUTOBODY WORKS
BANK CALIFORNIA SAN BERNADINO
BANK CALIFORNIA SANTA BARBARA
BAXTER J. M.
BAY PINES UNITED METHODIST CHURCH
BAYLAKE UNITED METHODIST CHURCH
BITTLE JUDITH TAMARA
BITTLE JUDITH THOMAS
BIXLER J. M.
BRITISH COLUMBIA FUR DISTRIBUTORS
BRITISH GUIANA MINERAL WORKS
BULGARIA INTERIOR DEPARTMENT
BULGARIA TREASURY DEPARTMENT
BURGER KING RESTAURANT NORFOLK VIRGINIA HAMPTON BOULEVARD 6144
BURGER KING RESTAURANT NORFOLK VIRGINIA HAMPTON BOULEVARD 8506
CARROLL COLLEGE HELENA MONTANA
CARROLL COLLEGE WAUKESHA WISCONSIN
CARTER LILY
CARTON LILA
CHIEF BIG HAT'S BOUTIQUE
CHITTUM C. W. ROOFING COMPANY
CHITTUM GEORGE USED CARS
CYCLE CITY
DEPASQUALE GERALD G.
DESPAIN LAWRENCE
DYNES EDITH
DYNES GRAHAM
EDWARDS STEWART T.
EDWARDS STUART T.
EMPRESS ORIENT IMPORTS INCORPORATED
ENSIGN O'TOOLE'S NAVAL SUPPLY
ENTERTAINER WEEK MAGAZINE
FAIRMONT CITY COMMISSIONER REVENUE
FINCH-JORDAN IRON WORKS
FINCH-MASSENBERRY CARPET
FLYING GULL HOTEL
FLYING HERON LODGE
FOUR WAY PRODUCTS COMPANY
FOUR-POINTS AUTO SUPPLY
FOURTEEN HUNDRED SERVICES INCORPORATED
FULLER O. MILDRED
FULLER ODESSA M.
UNITED STATES GOVERNMENT COMMERCE DEPARTMENT NATIONAL WEATHER SERVICE
UNITED STATES GOVERNMENT DISTRICT COURT CLERK COURTS
UNITED STATES GOVERNMENT DISTRICT COURT PASSPORTS

SUPPLEMENTAL HANDOUT TO UNIT 6
SECRETARIAL OFFICE PROCEDURES

Pasewark & Oliverio, South-Western Publishing Company, 7th Edition, Procedures for the Modern Office.

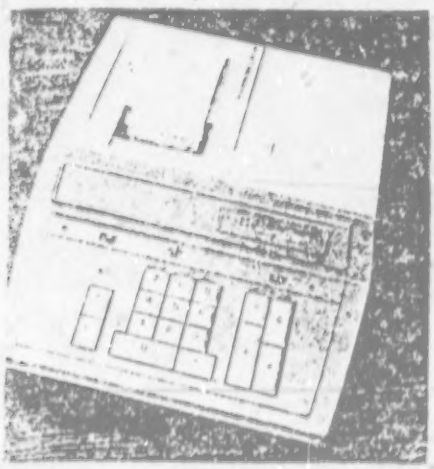
1. Insert for page 223 in Secretarial Office Procedures Book - omit Ten-Key Listing Machines, Mechanical Printing Calculators, and Full Keyboard Listing Machines.

There are four types of electronic calculators:

1. printing calculator
2. display calculator
3. combination printing-display calculator
4. programmable calculator

Printing Calculators

Computations are done electronically on printing calculators, but the actual printing is done mechanically; that is, a wheel or bars strike the paper tape to print answers. Computations of electronic printing calculators are shown on a paper tape so that they can be checked for accuracy against the original document.



3-6 Printing calculator

Display Calculators

Computations of electronic display calculators are shown by lighted figures in a window directly above the keyboard. They are used when a printed record of the calculators is not needed. They have no moving parts and are completely silent. Portable, battery operated models that can be held in one hand are available.

Combination Printing-Display Calculators

These calculators have a display window as well as a printing device. On certain models it is possible to disengage the printing device if a tape of the calculations is not needed.

Illus. 10-7 Printing-display calculator

Programmable Calculators

Sets of calculating instructions (programs) can be stored electronically on magnetic tape or other media for these machines. Other programs can also be inserted in the machine if needed. Calculations are started by operating the control keys on the machine.

2. Insert after calculators above.

Cash Registers

The cash register is widely used in business to process data. It makes a record of each transaction for the customer and the seller. The cost of each item, the total amount of the purchase, the amount given in payment, and the change returned are printed on two rolls of paper in the cash register by striking appropriate keys. One paper roll is threaded in the machine so the operator can tear off the tape for each transaction and give it to the customer as a receipt. The other roll is kept in the cash register and is called an audit tape. By using the audit tape, the seller is able to verify how much money should be in the cash register drawer at the end of the day.

Some cash registers automatically print the name of the store, the date, and even the time of day the transaction took place. Often a slogan or statement such as Thank You for Shopping with Us is included. Some cash registers may print a brief description of the item next to the price.

Other cash registers have electronic devices that can read prices and information written in bar codes or other specially designed codes.

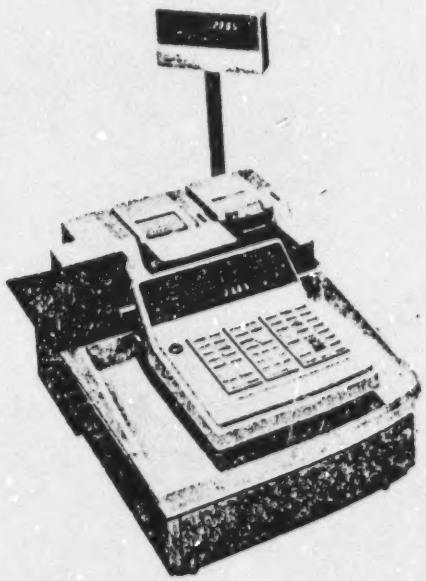
Electronic code readers are a time-saving feature because the operator does not have to keyboard the information into the cash register. The codes are read by brushing them over a small glass panel that has electronic reading equipment underneath it; information may also be entered electronically in the cash register when a special hand held instrument is rubbed across the code. Because codes are usually meaningless to people, prices and other helpful information to the customer may also be written in figures on the shelves or tags.

Some cash registers are being used in conjunction with computer systems.

NCR Corporation

Illus. 10-8

Cash register



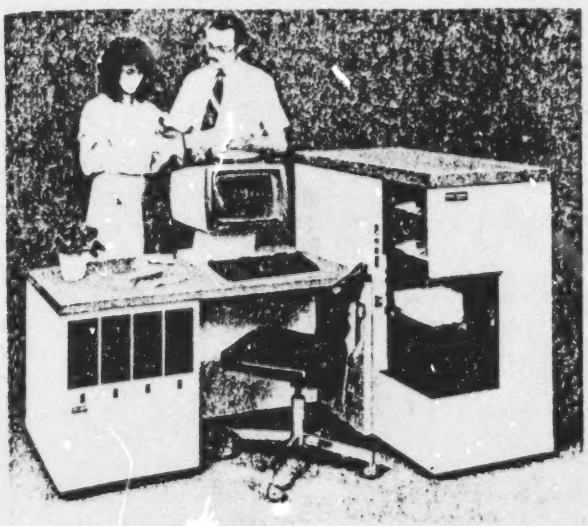
3. Insert after cash registers.

Machines That Can Read Print

Data represented by holes in punched cards and magnetic impulses on tape can be read by machines, but it cannot be read very well by people. Printed data can be read by people, but until recently it could not be read by machines. This meant that printed data on paper had to be converted to holes in paper or to electrical impulses on plastic tape before it could be understood by machines.

Recently developed computers make it unnecessary to convert printed data on paper into another form for the machines to read. Magnetic ink character recognition (MICR) and optical scanning machines can read printed characters (data). In the MICR method, characters are printed on documents with special magnetic ink that machines can read.

In the optical scanning method, numbers are printed with ordinary ink; but each character has a special shape, which can be read by a light beam. The light beam is then converted into electrical impulses on magnetic tape or in printed form on other documents. Some optical scanning machines can even read hand-written numbers.



Scan-Optics Inc.

Illus. 10-12

Bank type optical character reader

4. Insert after Output Unit, page 230, in Secretarial Procedures Book.

On-Line Equipment

Input and output devices do not necessarily have to be in the same room with the CPU. In fact, terminals consisting only of input and output devices are frequently set up in different locations so that more people can have access to the same CPU. Terminals that are connected to the CPU are considered "on-line" equipment.

On-line equipment is often used by large companies. For example, a branch office in Tucson may not keep a complete set of records on its customers. The sales representative may want to know what type of merchandise a specific customer ordered during the last three months, and this information might be stored in the home office computer in Denver.

The operator in Tucson types on the terminal requesting information from the computer, and in a few seconds the computer causes the information to appear on the screen of the terminal.

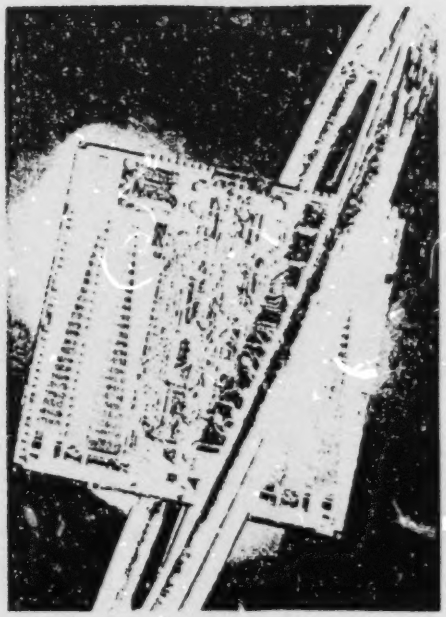
5. Insert after On-Line Equipment.

Microcomputers

In a microcomputer, the CPU is contained on a tiny silicon chip called a microprocessor. A microcomputer system consists of at least one input device, a microprocessor which is the CPU, and at least one output device.

Because microprocessors are very small and comparatively inexpensive, they have already been used to give "computer capabilities" to many kinds of appliances and equipment, and even automobiles. For example, a microwave oven contains a microprocessor. The push-button panel on the side of the oven is the input device, the microprocessor is the CPU that directs the cooking, and prepared food is the output.

Businesses are now beginning to use microcomputers because of their low cost and versatility. Small independent microcomputer stations can be established within departments as work stations. Or input and output terminals can be on-line with a central computer and can also contain a microprocessor for routine data processing. More possibilities for using microprocessors in business are continually being explored.



IBM Corporation

Illus. 10-14

Enlarged microcircuit chip in the eye of a needle

6. Insert after Microcomputers.

Integrated Data Processing

So that data processing efficiency can increase, a business can arrange for data recorded by one machine to be transmitted and processed by other machines. For example, to decrease the number of times the same data about a sale must be rewritten, some modern cash registers send sales data, such as the customer's name, the date, the articles purchased, and the price, directly to a computer to which they are connected.

This process that unites the work of data processing machines is sometimes called integrated data processing or IDP. The processing of data by machines with a minimum of human involvement is called automation.

So that one machine can process data from another machine, data must be recorded in a form that can be understood by both machines; this is called common machine language. Common machine language may take the form of holes punched in cards or magnetic impulses on plastic tape similar to a cassette tape. The punched holes in the cards and the magnetic impulses on the plastic tape represent letters, numbers, or symbols that can be understood and therefore processed by machines.